INDOT Consultant New User Quick Start Guide

ProjectWise (Thick Client and Web Server), ITAP, DOTWise Project Creator, Connection Information

10/31/2012 State of Indiana Scott Robison & Jason Kuhn

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1. Welcome to INDOT CAD

A Message from CAD Support

What you need to know

The purpose of this document is to quickly get you started on the right road at INDOT in terms of your firm doing business with INDOT. This document is what we call a quick start guide and will contain how- to's on everything from ITAP (creating an account and requesting access to a new application) to creating a Consultant Folder in ProjectWise. *Anyone wishing to use/access INDOT's ProjectWise datasource must enroll via ITAP*. This document will also discuss what ProjectWise is and how to navigate within it and also the IN.gov site (related to CAD) and GovDelivery subscriptions (important notifications about CAD software).

Thanks,

Scott Robison Jason Kuhn

2. IN.gov

The State of Indiana's website for all government agencies located at www.in.gov

INDOT's page on the IN.gov site is located at http://www.in.gov/indot/index.htm

Doing business with INDOT page is located at http://www.in.gov/indot/2384.htm

INDOT CAD Support is located at http://www.in.gov/dot/div/contracts/cadd/

- The page is broken up into sections:
 - News & Updates (Information about INDOT CAD Support)
 - CAD Links
 - ITAP (Registration)
 - https://itap.indot.in.gov/login.aspx
 - Indiana Design Manual
 - http://www.in.gov/dot/div/contracts/standards/dm.html
 - Sample Plan Set (coming soon)
 - Downloads & Information (CAD Workspace information)
 - http://in.gov/indot/3087.htm
 - Current Versions (Software INDOT is using)
 - CAD Connection Information (How to contact CAD Support)
- To the right of that page there is a CAD Downloads & Links section. This section will allow you to download various CAD workspace related items (.dgnlibs, seed files, sheet models, cell libraries, etc.)

This website is a live site and will be updated as new items of interest related to CAD and ProjectWise at INDOT are changed. Please bookmark the pages and check back often.

3. Gov Delivery Subscriptions

3.1 What is Gov Delivery

Gov Delivery is the State of Indiana's new mass communication tool. It is used by all State agencies to send out communications with internal and external users. It is taking the place of ListServ at INDOT and therefore will be used by INDOT CAD when we will have the need to update you on any CAD related issues (i.e. training opportunities, changes to the workspace, and new versions of software).

If you are a user of CAD software and or a ProjectWise user, you will automatically be enrolled to receive our updates at the time of getting a new user account.

3.2 Consultant Registration

This was made available to you our outside users/consultants.

There is a link on the IN.gov site located here: http://www.in.gov/dot/div/contracts/cadd/

It will look like the following image:



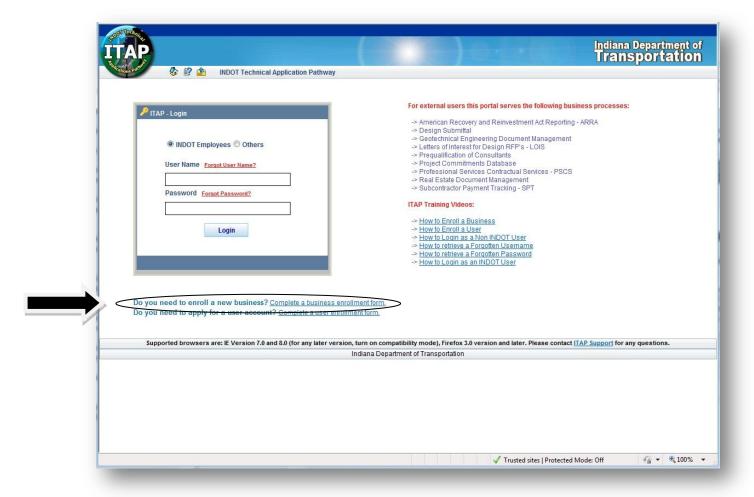
Upon clicking on the image you will be taken to a registration screen allowing you to sign up for CAD support updates.

4. <u>ITAP (INDOT Technical Application Pathway)</u>

4.1 Enroll in ITAP

You can access ITAP at https://itap.indot.in.gov/login.aspx or on the IN.gov Consultants

Prequalification page (ITAP Submittal Portal) then by selecting the link and form: Do you need to enroll a new business? Complete a business enrollment form



4.1-1 Business Enrollment:

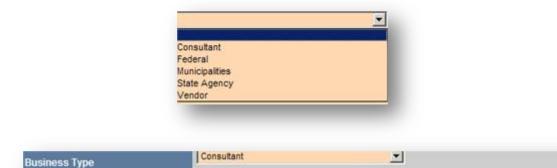
- To enroll a business, fill out the Business Registration Business Information panel and then fill out the Business Registration - Primary Contact Information panel.
- In the Business Registration Business Information panel, enter information as needed.



Field values that are grayed out are auto-populated, and therefore <u>NON-EDITABLE</u>. Fields with a peach background are REQUIRED. Fields with no background color are OPTIONAL.



When selecting a Business Type, choose one of five Business Types; once a selection is made, a
definition will be placed in Description.



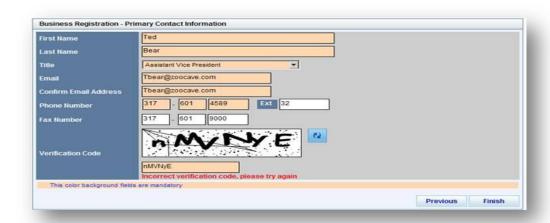
A firm or sole proprietor that provides engineering, surveying, architecture, or other services for the

development of a transportation project or transportation related services.

- City and State are automatically displayed after entering Zip Code and pressing enter.
- DUNS Number refers to a Dun and Bradstreet market indicator value.
- Click on the Start button to save and advance to the Business Registration Primary Contact Information panel or click Cancel to return to the ITAP Login page without saving.
- In the Business Registration Primary Contact Information panel, enter information as needed.

Description

 The Primary Contact is the person from a business who will approve other business user's requests for a userid or an application. In addition, the Primary Contact may maintain user information.



- ITAP does not allow duplicate email addresses.
- City and State are automatically displayed after Zip Code is entered.
- A **Verification Code** must be entered by typing the characters or numbers shown in the display box. If the characters are not easily recognized, click the **Get another verification code** icon next to the Verification Code display box to receive another verification code. This icon may be clicked as many times as needed. Verification Code is not case sensitive.



ITAP will not advance to the next screen if a required field is left empty. A message in red will appear to the right of the field and the cursor will blink inside text fields while dropdown fields will be highlighted.

 Click on the Finish button to save or click Previous to return to the Business Registration – Business Information panel. • If the save was successful the **Confirmation** message displays, click on the **OK** button.



OR

• If the following Error message displays, click on the **OK** button to return to the **Business** Registration – Primary Contact Information panel to correct the email address.



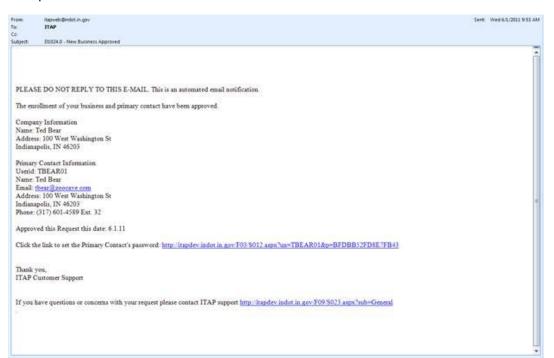
4.1-2 Business Registration Acknowledgement

Once the Registration is submitted an acknowledgement email will be sent to the Primary Contact's email.



4.1-3 Business Registration Approval:

Once the request is approved or denied, an email will be sent to the Primary Contact's email with a link to set a password.



4.1-4 Business Registration Denied

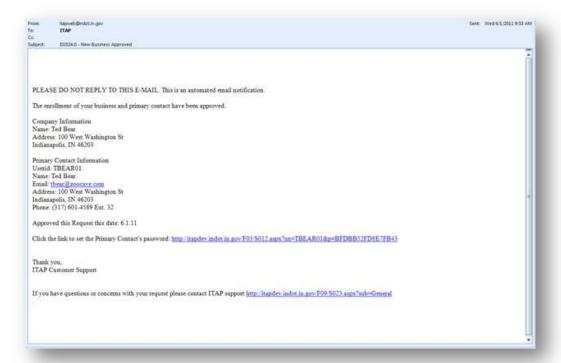


4.2 Change Password

4.2-1 Change Password Panel:

• Change Password Panel is displayed by clicking the set a password link provided in the "New Business Approved" or "New User Approved" email or if a Password is forgotten, in the "Request for ITAP Password" email.

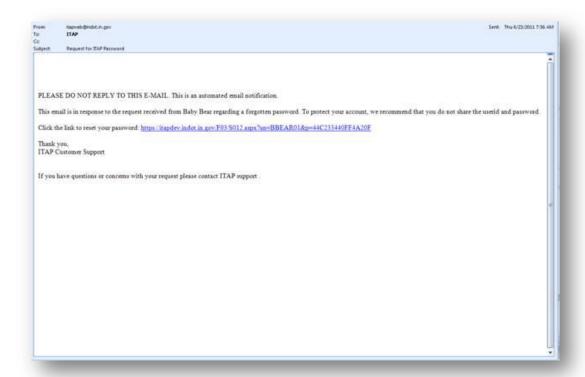
New Business Approved



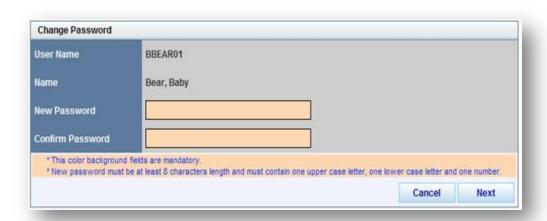
New User Approved



Request for ITAP Password



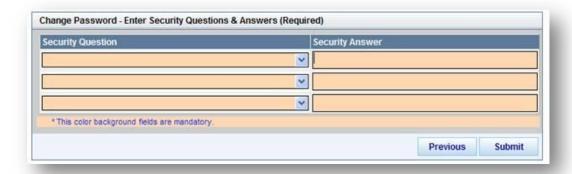
• In the **Change Password** panel, enter information as needed.



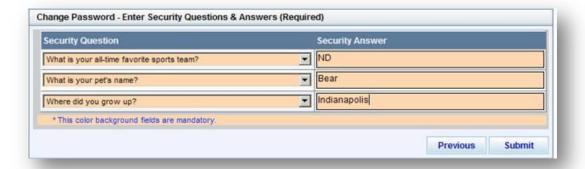
- Password is case sensitive, must be at least 8 characters in length, and must contain one upper case letter, one lower case letter and one number.
- Click on the Next button to advance to the Security Questions and Answers panel or click on the Cancel button to exit without setting a password.

4.2-2 Security Questions and Answers

- Users are required to select three security questions and provide answers to the questions. This information will be used to verify a user's identity when a password is forgotten.
- In the **Security Questions and Answers** panel, enter information as needed.



• Security questions may be selected from a drop down list. Select a different security question from each of the drop down lists (please answer all 3).





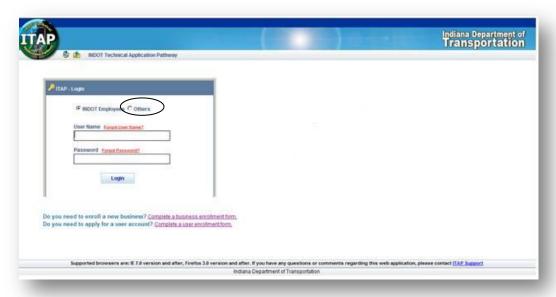
ITAP will not advance to the next screen if a required field is left empty. A message in red will appear to the right of the field and the cursor will blink inside text fields while dropdown fields will be highlighted.

 Click on the Submit button to save or click on the Previous button to return to the Change Password panel. If submitting, click on the OK button at the confirmation message.



4.2-3 ITAP Overview:

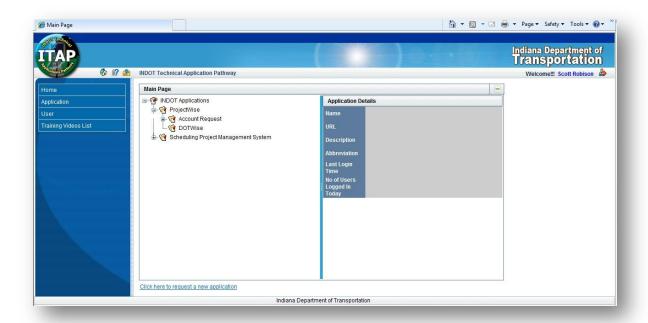
- The Home Main Page provides a list of a user's approved applications with application details, a link to request access to additional INDOT applications and a link to request additional roles for some applications. (Click Help icon at top left of page for additional instructions)
- If you had never previously logged in to ITAP you will be asked to login to via the ITAP Login screen and enter a valid **User Name** and **Password** and click on the **Login** button. As you are not an INDOT Employee be sure to select the **Others** dial.



To access Online Help click on the Icon at the top of the screen.

To contact ITAP Support click on the icon at the top of the screen.

• If you have already used ITAP in the past and enrolled or logged in for access to other applications they will shown on your main page when you click the ITAP link. It should look very similar to this screen.



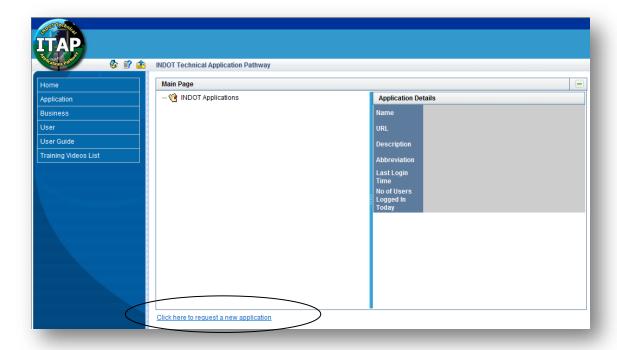
4.2-4 Request new ProjectWise Account (Application Request)

To request access to ProjectWise and the new DOTWise Project Creator you will start out by going to the following location:

- A User may request access to a new INDOT application from the ITAP Menu and from the ITAP Home Page.
- Option #1 -To request a new application from the **ITAP Menu**, select **Application**, and then **Request New Application**.

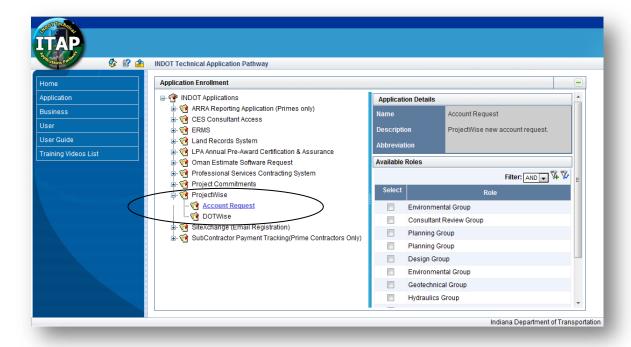


• Option #2-To request a new application from the ITAP Home Page, click on the link "Click here to request access to new application".



- Select ProjectWise-Account Request
- Select DOTWise application Request

Selecting Request New Application **from the** ITAP Menu **or the link** "Click here to request access to new application" **from the** ITAP Home Page **will display the** Application Enrollment panel.



- In the Application Enrollment panel, select one of the INDOT Applications from the left side of the panel. Application Details and Available Roles (if applicable) will be displayed on the right side of the Application Enrollment panel.
- As a consultant you will not have to select a Role when applying for Account Request to ProjectWise. Please do not!!! We will assign you the consultant Role internally in CAD Support.

If the **Submit** was successful the **Message** below displays, click on the **OK** button.

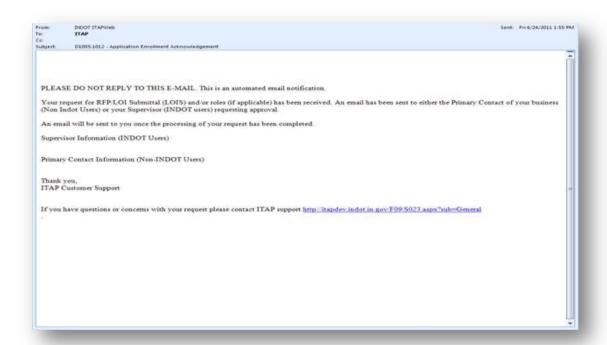


If a previously submitted request is still pending the **Message** below displays, click on the **OK** button.



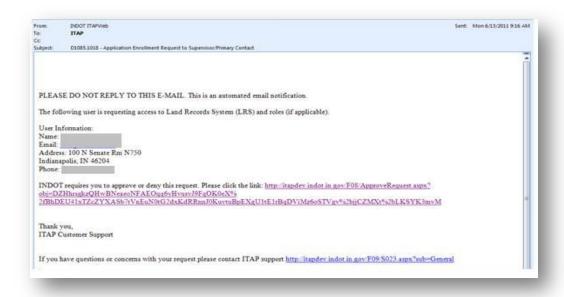
Once the request is submitted successfully, an Application Enrollment Acknowledgement
email is sent to the users email address and one or more approval/denial steps must be
completed before the request is complete. The first step is for the INDOT Supervisor or the
Business Primary Contact to approve/deny the Users request for access to the application.
Based on the results of the first step; the second step, if applicable, is for the INDOT Application
Administrator to approve/deny the Users request for access to the application. If the first step
is denied, processing remaining steps is not necessary.

Application Enrollment Acknowledgment Email



4.2-5 Approve or Deny a Step

The INDOT Supervisor or the Business Primary Contact is responsible for approving or denying a
users request for an application. An email will be sent requesting you to approve or deny the
users request. To approve or deny the request, click on the link in the email and the New
Application Request Enrollment Approval Panel is displayed.

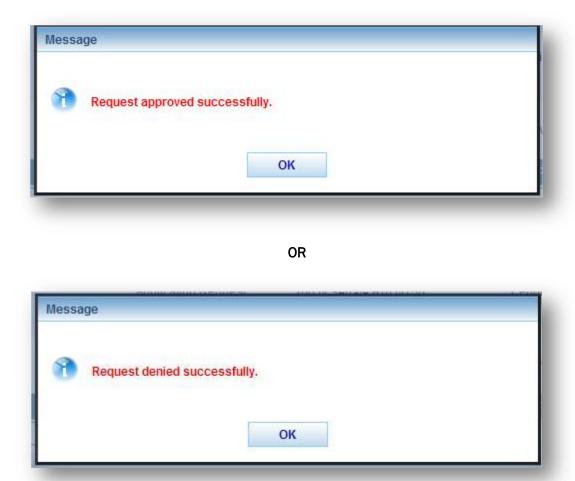




From the **New Application Enrollment Request Approval Panel** click on the **Approve** and **Close** button to approve the request or the **Deny** and **Close** button to deny the request or the **Close** button to return to the **Application Request Panel** without approving or denying. If denying the request, **Comments** are required.

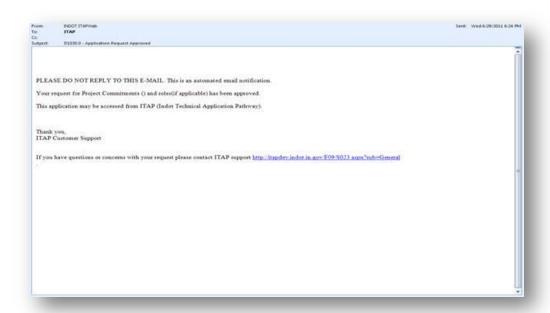
If the request was approved or denied a confirmation message will display. Click on the OK button to confirm the action and the **Application Request Panel** is displayed.

You will get a notification email back once you have been approved access.

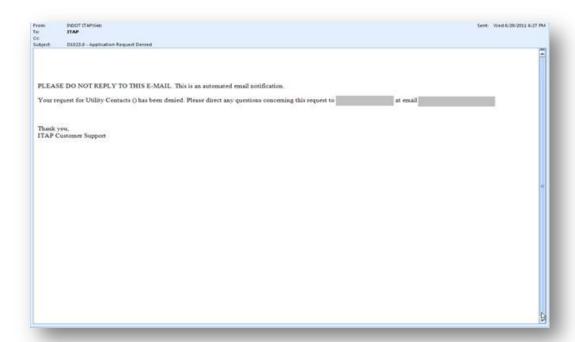


After the Application Administrator step is complete an approval or denial email is sent to the Users email address.

APPROVED EXAMPLE



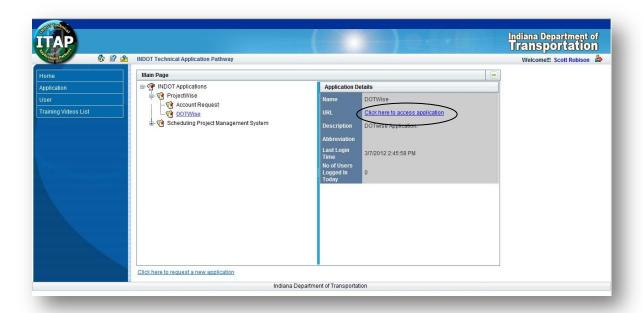
Denied Example



In the Application Enrollment panel, select one of the INDOT Applications from the left side of the panel. Select ProjectWise-DOTWise then the Submit button.

An email request will be sent to your supervisor for approval. Once he/she approves the
request an email will be sent to CAD support granting access to the Project Creator Web
Interface.

Upon approval- You will have an active link under ProjectWise/DOTWise as shown below:



To access Online Help click on the Icon at the top of the screen.

To contact ITAP Support click on the icon at the top of the screen.

A new window will open with the Project Creator interface when the link is selected. This will be covered in the next section.

5. **ProjectWise at INDOT**

5.1 Introduction

ProjectWise is a suite of software provided by Bentley Systems aimed at helping to manage, find, and share active project data, including CAD and geospatial content, as well as Office documents. It is being utilized by INDOT as the project lifecycle tool and is the location of all active project data. *There are now two methods for accessing INDOT's ProjectWise datasource (#1 –Thick Client) (#2-Web Server)*

5.1-1 Standard Key Benefits

- Save time finding, validating and accessing project information
- Reduce project risk with a single source of truth for all project information
- Improve quality and consistency of all project deliverables
- Meet deadlines
- Share work across multiple offices and locations
- Access to INDOT's Managed Workspace

5.1-2 Key Benefits for Consultants working on INDOT Projects

- The sharing of Data with INDOT staff
- No more using of FTP sites to transfer data
- No more burning of data to CD's
- No need to mail CD's or physically carry CD's of data to INDOT
- No more attempting to attach large files to emails and hoping they get there when you send them
- Quick visual confirmation that the data is in the folder (audit trail)
- Work on projects in different Districts and see them in one screen using ProjectWise

5.2 Obtaining ProjectWise

If your firm does not already have ProjectWise or a Bentley product, (if you have MicroStation you may already own ProjectWise) you will have to contact Bentley Systems Inc. to obtain a license. The current account rep for INDOT is Brian Curran and his contact information is as follows:

Brian Curran

Account Manager

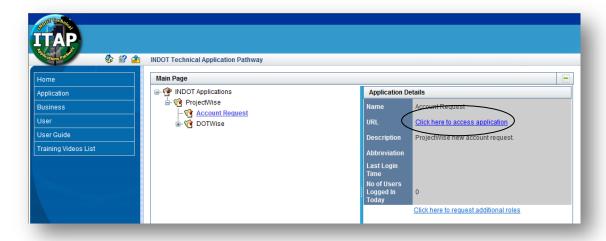
Bentley Systems, Inc.

1-800-BENTLEY

brian.curran@bentley.com

5.3 Logging in to ProjectWise (Thick Client)

Upon completion of the ITAP enrollment (*Both Thick Client and Web Server users must enroll via ITAP*) account request you will be given access to a link under Account Request to a URL that contains a document with ProjectWise connection information to INDOT's datasource.

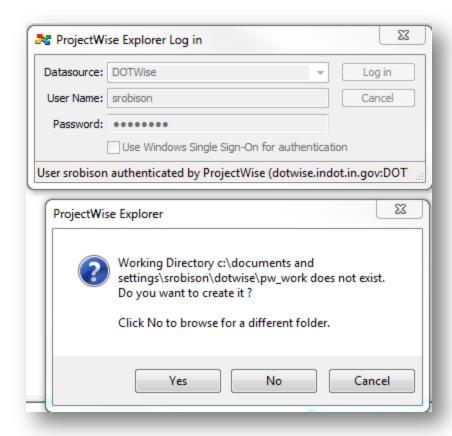


You will also receive in the confirmation email a User Name (first Initial last name) and Password assigned by INDOT's CAD Support section (the password can be changed by you the user)

ProjectWise Desktop icon



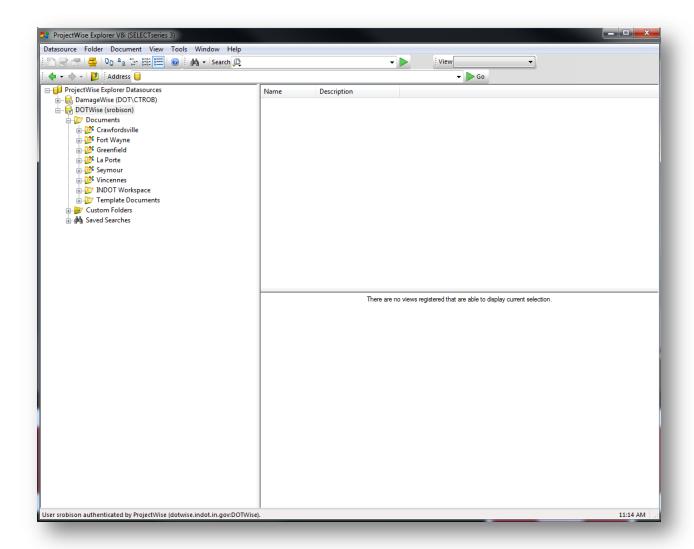
Double click the icon to Log in



• You may also be asked to create a working folder on your machine for local copies.

ProjectWise Explorer is the main user interface for ProjectWise, where active projects, folders and documents will be accessed.

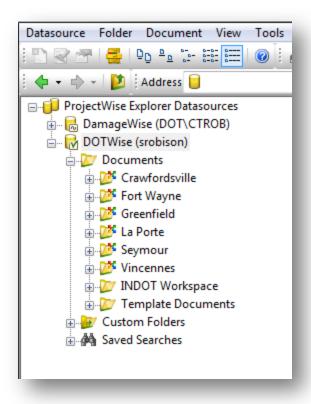
In ProjectWise, the left side of the application window is where the data sources (you will only see the ones you have rights to use), projects and folders are displayed, and the right side of the application window are where the selected folder's documents are displayed. The preview pane is the area below the document list and displays properties of the selected folder or document.



5.4 ProjectWise Folder Structure

5.4-1 Overview:

To maintain standardization, avoid duplication, and provide a better workflow, a Location: Designation Number (abbreviation Des. No. will be used throughout remainder of document) based project structure would best suit INDOT's workflow. As shown in the image below, when Documents is expanded, there will be a listing of all the District locations, as well as other folders that will be discussed later.

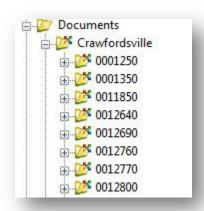


The DOTWise Root Folder Structure

5.4-2 Project folders:

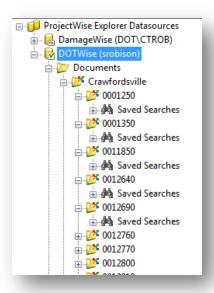
Expanding any district folder will display a list of any Des. No. that has been requested under that location. The route number and/or description will be displayed in the description field.

District w/Des. No.



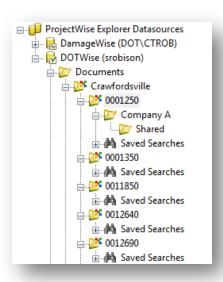
 Although you will see all of the Des. No.'s listed for each district, you as a consultant will not see any subfolders under them (except for saved searches) unless you have created a project via ITAP and the new DOTWise project creator (Covered in Chapter 4) See picture:



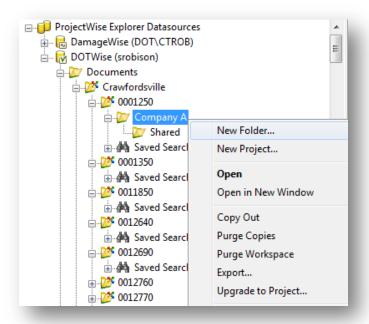


• Once you have created a project a structure will be created like the one in the following picture. (Your Company Name) will be the top level folder and the sub folder will be called Shared. Your Company folder is where you will place documents and drawings that you wish to share with the INDOT staff working with you on your project and likewise INDOT staff will place data in the Shared folder for you to see (see Chapter 4-page 35).

Project with Company Folder



 You will have the rights to create additional subfolders as need. Right click on the Company folder and select New Folder as shown below:



5.5 ProjectWise Security Overview

5.5-1 Overview:

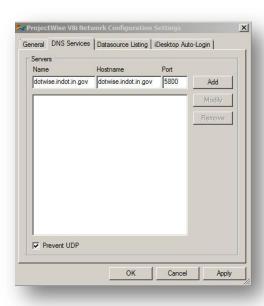
The DOTWise ProjectWise Datasource adheres to a strict security model, providing inner discipline security as well as external security, while providing all INDOT users the ability to review other data as necessary. In addition to these security features, there are additional settings that are used administratively in order to provide rapid support and file restorations, should the need arise. These settings are as follows:



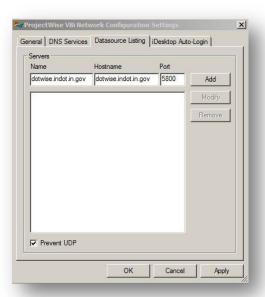
- Although you can create projects with the Project Creator you cannot delete one- Contact CAD support for deletion request. (IOT Help Desk Ticket) –Be sure to put *INDOT CAD* in the Short Description and *ProjectWise* in the problem area. or by emailing <u>mailto:INDOTCADsupport@indot.in.gov</u> if you do not have access to the Help Desk.
- 2. You can create sub-folders under your project you cannot delete one- Contact CAD support for deletion request.
- 3. Users will not have folder delete privileges; this will aid in CAD Support's ability to process restore requests (no guarantees).
- 4. Document delete privileges will be granted (you are responsible for your own data) if you need something restored that was deleted we will make an attempt (no guarantees).

5.6 ProjectWise Connection Information

DNS Services – Name - dotwise.indot.in.gov Hostname - dotwise.indot.in.gov Port – 5800



Datasource Listing
Name - dotwise.indot.in.gov
Hostname - dotwise.indot.in.gov
Port - 5800



6. Logging in to ProjectWise (Web Server)

6.1-1 ProjectWise Web Server (https://dotwise.indot.in.gov)

The ProjectWise Web Server is used to provide a web browser interface for ProjectWise users.

Web browser-based access for ProjectWise is intended for casual users who are in remote, possibly low-bandwidth locations. The ProjectWise Web Server connects to Microsoft SharePoint to extend ProjectWise managed content to users through a SharePoint portal. (You do not get the INDOT Managed Workspace when using this interface)

Be sure to add the site to your Trusted Sites in IE and install the ActiveX controls (you will also have to restart IE)

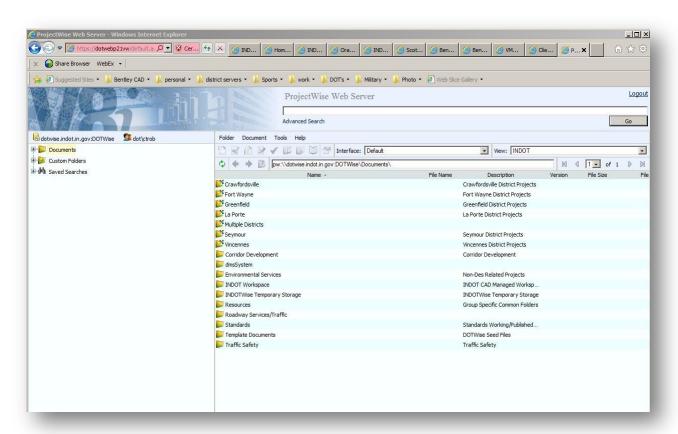
1. You will see the following log-in screen when you get to the site:



- 2. Be sure to use the log-in credentials that INDOT CAD Support has provided you.
- 3. **Do not** check the (use current Windows credentials (SSO)
- 4. Make sure you have selected (DOTWise) as your location. see below

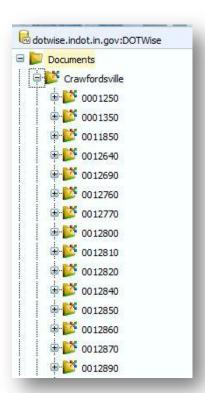


5. Upon log-in your screen will look like the following:

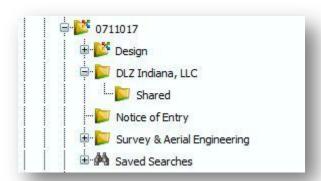


6. Much like the Thick Client in the Web Server interface you will see the Documents Folder, underneath contains all of the District project locations (by clicking on the + symbol they expand to show the projects listed by Des No.

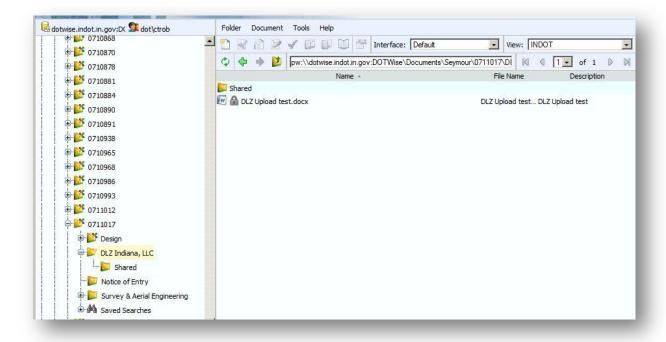




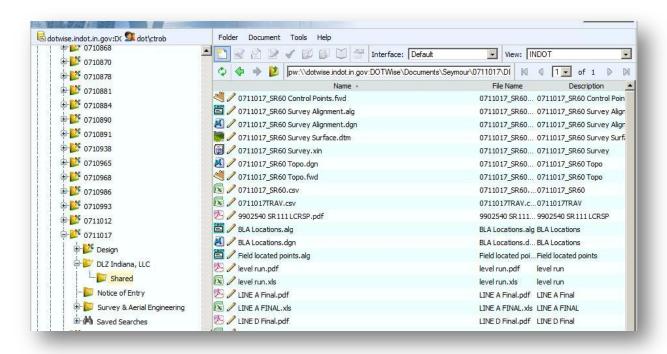
7. Your Company's folder and the Shared folder will then be shown under the Des No. after you have completed created them using the DOTWise Project Creator (Discussed in Section 4 of this document)



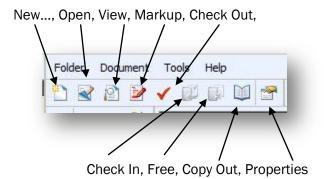
8. The contents of your folder can only be seen by INDOT staff and members of your company that have been granted access via ITAP. Your company folder is where you place documents for INDOT staff to view.



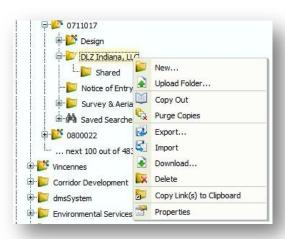
9. The Shared folder is where INDOT staff places data that want to share with your company.



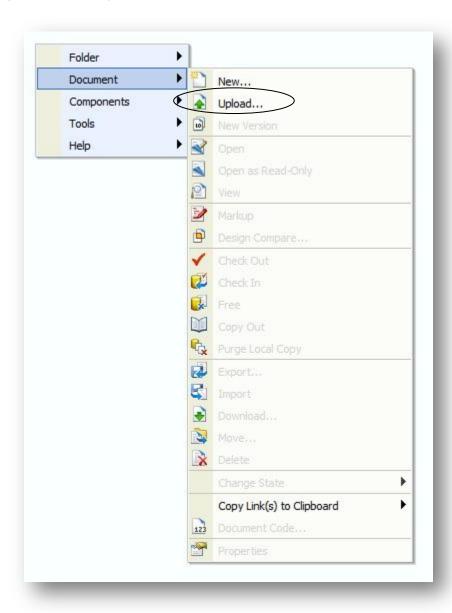
10. The Toolbar across the top of the Document View Window has a variety of tools for



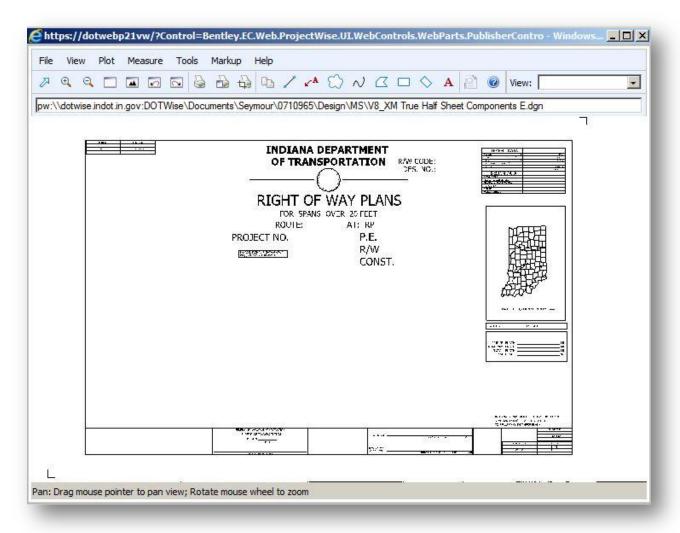
- New... (allows you to create and place new documents into the folder you have rights to.
- Open (allows you to open the selected file in the associated application)
- View (similar to open, except with CAD files it will view the .dgn files in a built in viewer that has markup tools/functionality)
- Markup (built in markup viewer that allows you to markup the .dgn file, creating a .rdl overlay file) – also contains builtin printing/plotting functions.
- Check Out allows you to copy out a file to your local working directory to work on and locks it so no other user can check out or export the document while you have it checked out..
- Check In allows you to check a file back in after having worked on it. (you will be prompted to add comments)
- Free frees a file that had been checked out without adding any of the edits back into ProjectWise.
- Copy Out to download a copy of the selected document to your working directory without changing the status on the server.
- Properties allows the user to see all the associated document properties, including audit trail and refernces.
- 11. By right clicking on the folder you will be given another set of tools as well that will help with document and folder management.



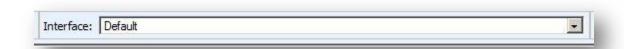
12. From the folder document view window you can select document upload or right click in the window and also use the upload command to place a document into the folder. (Files cannot be placed in the Web Server via drag and drop as they can in the Thick Client – you must use the Upload command)



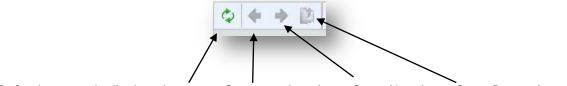
13. Here is a sample of a .dgn opened in the file viewer/markup tool



- 14. The toolbar for this viewer has panning, zoom, rotate, printing/plotting, and markup tools.
- 15. The Inteface: tab on the toolbar is currently only for INDOT staff (please leave set to Default if you are an external user).



16. The address bar has some additional tools and also contains the PW location of the folder and files you are viewing:



Refresh currently displayed content, Go to previous item, Go to Next item, Go to Parent item

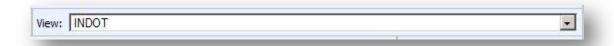


ProjectWise location of folder or file (Can but cut and pasted into email as link)

17. The Web Server Search engine allows you to search for files or folders: (Just key in name and select go – results will be posted in search results and view window)



18. The contents (name, description, file size, updated by etc.) of the view window are shown based on the View: toolbar (by default set to INDOT)

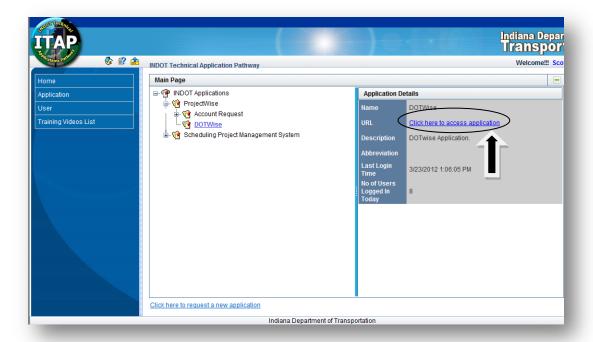


7. **DOTWise Project Creator Interface**

7.1 Accessing the site

7.1-1 Overview:

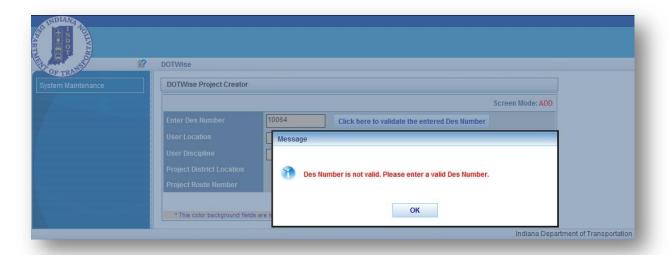
The DOTWise Project Creator tool allows both internal and external users the ability to create ProjectWise projects without modifying the underlying security model. (*Access via ITAP link*)



• To create a ProjectWise project, enter a Des Number (required) for the project and click the **Validate Des Number** button.

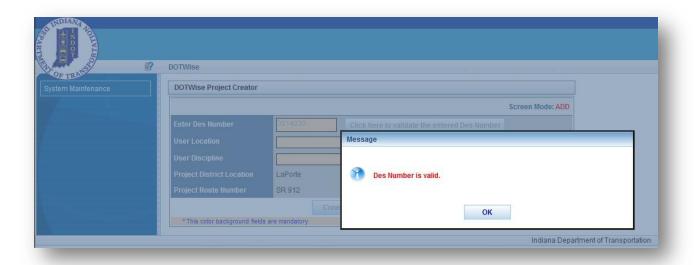


The application will check to see if the Des Number is a valid Des Number or not. If the Des Number entered is not a valid Des Number, a message will be displayed stating that the Des Number entered is not valid

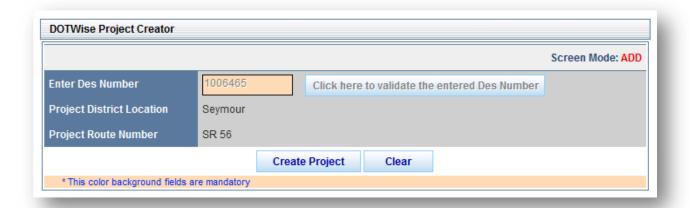


Clicking the OK button will allow you to change the Des Number to a valid Des Number.

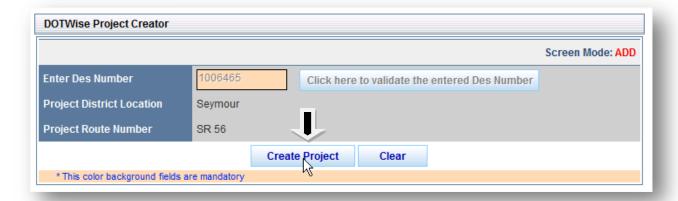
If a valid Des Number is entered, a message will be displayed stating that the Des Number is valid.



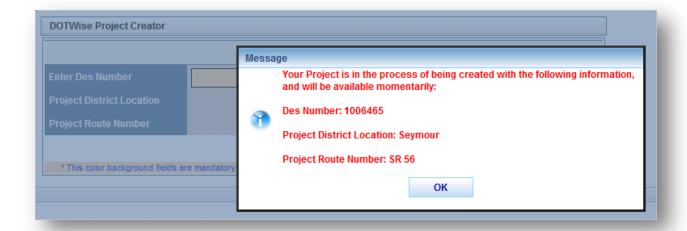
Click the OK button and you will see that the Project District Location and Project Route
 Number values are displayed on the form. You will also see that the Create Project button is enabled.



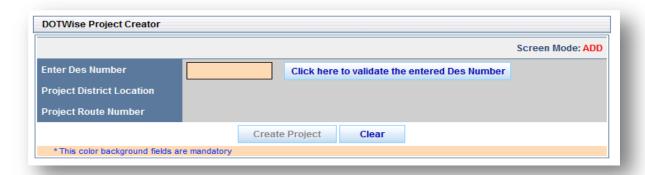
• To create the project, click the **Create Project** button.



A confirmation message will appear showing that the project is in the process of being created. You will also see the project information. There may be a small delay (1-2 minutes) before project shows in ProjectWise.



• Click the **OK** button to start a new project from the beginning or to exit the program.



Upon completion of the Project Creation you will now have a folder in ProjectWise with the name of your company listed under that Des Number in the District specified. It will have a sub folder called Shared. For more information see pictures and page 31-32 of section 5:

Consultant structure

